

CARE COORDINATION

POWERED BY bQuest



3 Levels of Care Coordination Support



Care Coordination Platform

As a client, you have exclusive access to the bQuest Care Coordination platform, where you will find curated information resources and make valuable connections with a variety of aging care and end-of-life service providers.



Digital Rolodex

The Digital Rolodex enables your Financial Advisor to tap into the bQuest Aging Care Ecosystem to facilitate 1-on-1 client referrals to vetted aging care and end-of-life service providers.



Care Concierge

Care Concierge is ideal for clients seeking personalized, human-enabled support with a high level of attention and Care Coordination service.

Need Help?

Reach out to your financial advisor as they can share more details on this program and provide additional support, as needed.

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GETTING STARTED WITH A

CARE CONCIERGE CONSULTATION

Get personalized support with bQuest Care Concierge.

The bQuest Care Concierge is available for any client seeking personalized, one-on-one support with a high level of service. If you are searching for answers and guidance; and would like to receive hands-on care coordination support please see what is included in the engagement. Your Advisor will connect you via email with a bQuest Care Coordinator to get started.

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1

Intake Process (15-Minute)

Intake overview to confirm this service fits your needs, review the engagement cost (if applicable), delivery of the client engagement agreement and a link for scheduling the kick off Discovery Assessment.

2

Discovery Assessment Session (60-Minute)

Meeting to understand your current situation, family dynamics, care structure, and key members involved in decision-making.

3

Care Coordination Plan & Education (60-Minute)

Meeting to engage all family care coordinators in reviewing the loved one's needs and their Care Coordination Plan to include a summary assessment, referrals to vetted professionals, and additional resources for the care recipient and all family caregivers.

4

Follow-Ups (30-Minute)

Available for follow up time via phone or email to answer any questions and to ensure successful connections with recommended service providers and assess any ongoing support needs.

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GETTING STARTED WITH THE CARE COORDINATION PLATFORM

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As a client, you have exclusive access to the bQuest Care Coordination Platform.

Easily find resources and make professional connections to a community of vetted experts when navigating aging care needs for you or a loved one, including some of these service providers.



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GETTING STARTED WITH THE CARE COORDINATION PLATFORM

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Get started with
3 easy steps

1

Scan the QR code below or [CLICK HERE](#) to get started

2

Answer a few questions regarding your unique situation and needs.

3

Receive personalized recommendations for information resources and professional connections to vetted service providers.



SCAN HERE TO GET STARTED

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